Getting Started Guide

This guide will walk you through the recommended steps to begin using Truck Tracker software. If you follow the steps below, you will have a good base to begin using Truck Tracker in the most effective way.

Step 1: Installation of Software (See User Manual, Chapter 2)

Step 2: Login to the software as *Manager*

a. There are two default logins that you can use. The first is - Username: *Manager* and Password: *pass*. The second is - Username: *Mechanic* with no password.

b. *Manager* will give you full access to the system while the *Mechanic* only has limited access, which you can modify (See User Manual, Chapter 16).

Step 3: Register Software (See User Manual, Chapter 4)

a. After you logon for the first time, you will need to enter the registration details issued by FleetSoft. Contact support for further assistance in registration.

Step 4: Global Configuration (See User Manual, Chapter 4)

a. In the software if you choose the *File* menu and choose the *Settings* option, you will be able to configure some global company information.

b. Change the *Company Name* field to the name of your company

c. Click on the *Global Settings* tab. You must decide if you would like to use Average or Actual costing for your inventory management. You can also review the other settings located here.

Step 5: Site Configuration (See User Manual, Chapter 4)

a. In the software if you choose the *File* menu and choose the *Settings* option, you will be able to configure some information for the current site.

b. Setup you site's address info, Vehicle User-Defined fields, WO default settings, Parts Inventory default settings and Barcode settings.

c. If you intend to scan manufacturer barcodes, remember to set the Barcode Scanner Prefix Character site setting. Then program your barcode scanner to include the chosen character as the prefix of each scan.

Step 6: Configure Security (See User Manual, Chapter 15)

a. You can optionally configure user and group security settings, which allows you to password protect certain areas of the software, by clicking the security button on the toolbar. This area allows you to add users, groups of users, configure security settings for each, and change passwords.

b. All users have Delete permission disabled by default.

Step 7: Set up Drop Down Lists (See User Manual, Chapter 4)

a. By choosing the *Lists* menu and selecting *Drop Down Lists,* you will be able to insert, change, or delete items from the drop down lists in the software such as Color, License, Make, Model, Year, Meter Types, etc.

Step 8: Now you must create and/or organize the Vendor List (Ch.5), Customer List (Ch.6), Staff List (Ch.7), Service Code List (Ch.8), Vehicle list (Ch.9), and Parts Inventory (Ch.13). Most of these can be found either on the toolbar or in the *Lists* drop down on the main menu

a. It is recommended that you enter the data in the order that it appears in Step 8.

Step 9: Setup Preventive Maintenance (PMs) (See User Manual, Chapter 10)

a. Once you have created all of your vehicles and configured your service codes, be sure to create your PM schedule by clicking on the *PMs* button on the toolbar.

Step 10: You are now ready to begin using the software!

a. Work Orders can be created using either the *Vehicles or WOs* buttons on the toolbar, (See User Manual, Chapter 11).

b. In Truck Tracker, printed work orders show you the internal cost for the repair while printed invoices show you the marked up prices and labor rates you charge your customers with sales taxes added.

c. For detailed information on the different levels, overriding of parts markup percents, and labor rates see the “Work Order Information” section in Chapter 11 of the user manual.